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# UDAAN User Manual – South and East CDR Zones

## May 2015

BSNL
Connecting India

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# Document Release Note

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## Document details

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## Revision details

| Action taken (add/del/change) | Previous page no. | New page no. | Revision description |
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|          |               |                      |          |                   |              |                   |                          |

# About this Manual

This manual provides the overview of the CRM Lead Management UDAAN CR and the tasks performed to complete the defined business scenarios.

## Purpose

This manual has been written to help BSNL users understand and use the Lead Management process flows. It presents the functional capabilities and operational details of Lead Management that users should know for performing business tasks using CRM Lead Management. Additionally, this manual provides information creation of Lead in three different ways.

## Intended Audience

This manual is intended for the use of BSNL personnel.

## Prerequisites

Following are the prerequisites for performing the tasks presented in this manual:

| | |
|---|---|
| **Functional** | Basic functional knowledge of the services provided by BSNL |
| **Technical** | • Basic knowledge of Siebel application<br>• Should have attended CDR training conducted for CSRs |

## Typographical Conventions

The following table gives the details of the typographical conventions used in the document:

**Typographical Conventions**

| Formatting Convention | Type of Information |
|---|---|
| Title Case & **Bold** | All the buttons used in the application are written in Title Case & **Bold** font. For example, Click **Submit Order** |
| *Italics* | All the error messages, alerts, status of the fields and values are written in *Italics*. For example, A message, *Validations Successful,* appears |
| Field Names | All the field names in this document are written in Title Case. For example, The Account Name field is a hyperlink |
| User-entered text | Text that you enter appears in Arial font |

# Contents

# 1. Introduction

This chapter provides an introduction to the CRM Lead Management - UDAAN

## 1.1. Purpose of UDAAN

BSNL has launched UDAAN project to capture the leads for various services. Sales team in each SSA will be responsible for capturing the leads and converting them to BSNL Customers. CDR systems are now ready to support UDAAN project requirements.

## 1.2. Features of UDAAN

Following Lead management activities for Landline, Broadband, ISDN and FTTH are supported:

- Lead Creation through following channel of approach :

  1. Walk-in

  2.  BSNL Sales Agent

  3. Call Center

  4.  Franchisee

- Lead Creation Through WSC login

- Lead Creation through channel of approach as SMS and Internet (WSC Portal)

## 1.3. CRM Application Environment

This section describes the software and hardware environment required to run CRM Application.

### 1.3.1.  Software Environment

| Operating System | Microsoft Windows XP Professional SP2 or above |
|---|---|
| Database | NA |
| Server Software(s) | NA |
| Other Software(s) | Internet Explorer 6.28 and above |

### 1.3.2.  Hardware Environment

| Servers | NA |
|---|---|
| Network Infrastructure | The desktop should be in BSNL intranet |
| Communication Infrastructure | NA |
| Other Hardware | NA |

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## 1.4. CRM Modules used in UDAAN flows

Following 7 modules of CRM application are being used for UDAAN based Leads and Order management are:

- Contacts
- Customer Accounts
- Billing Accounts
- Orders
- Lead Management
- Pre Lead Management
- Franchisee

## 1.5. User Roles

- Call center CSR
- CSC CSR
- Sales Team Lead
- WSC CSR
- SMS CSR

# 2. Getting Started

## 2.1.    Lead Creation for new customer

To create a new lead for a new customer, following steps should be followed -

1. Create a new Customer in Customer Account.

2. Add his/her contact details under Contact View.

3. Add his address, installation as well as billing address under Address View.

4. Then create a new lead under Leads View.

A screenshot of Lead View is given below -



5. Create a new lead by clicking on **New** Button. A new record will be generated.

A screenshot of Lead Creation is given below -

6. Enter Opportunity Name.

7. Select the installation address from pick applet.

8. Select the service type.

9. Channel can be BSNL Sales Agent, Walk-in, Call Centre, Franchisee

10. In case, the channel chosen is Franchisee, Franchisee code has to be selected.

11. LL Phone Number field is mandatory for taking new Broadband, Prepaid BB or VPN connection.

12. Click on **Assign to Sales Lead**

A screenshot on clicking on Assign to Sales Lead.
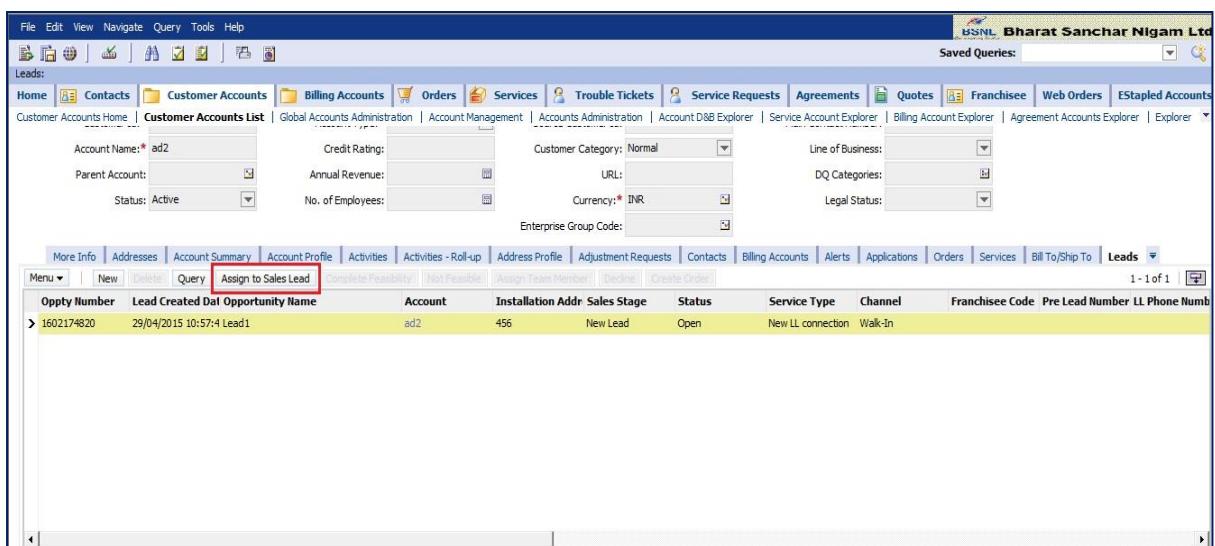


Screenshot after clicking on Assign to Sales Lead
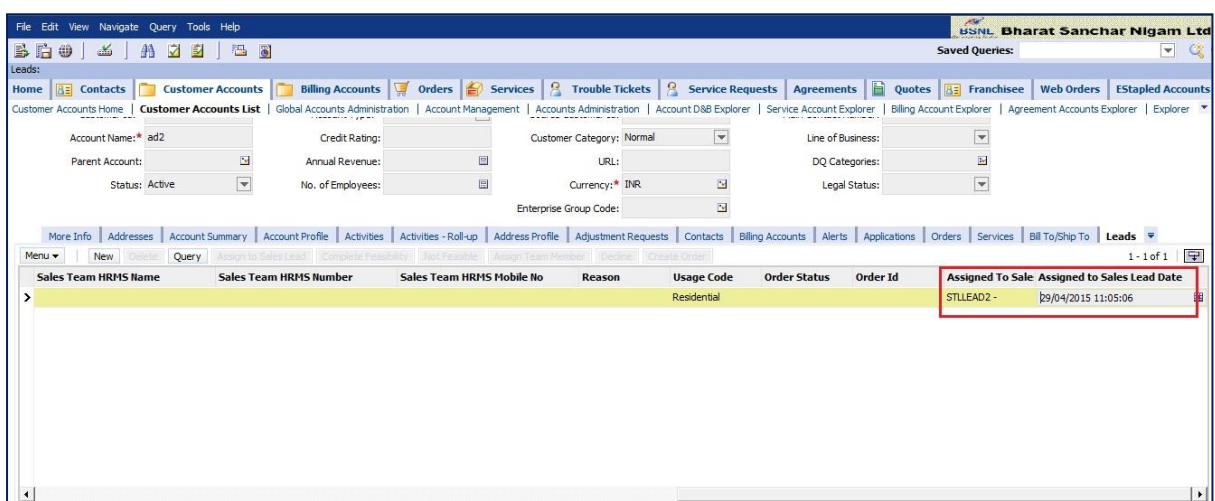
13. It gets assigned to a Sales Lead mapped at SSA level.

14. Login through the Sales Lead credentials.

15. An automatic alert will be generated on his home page in alert applet.
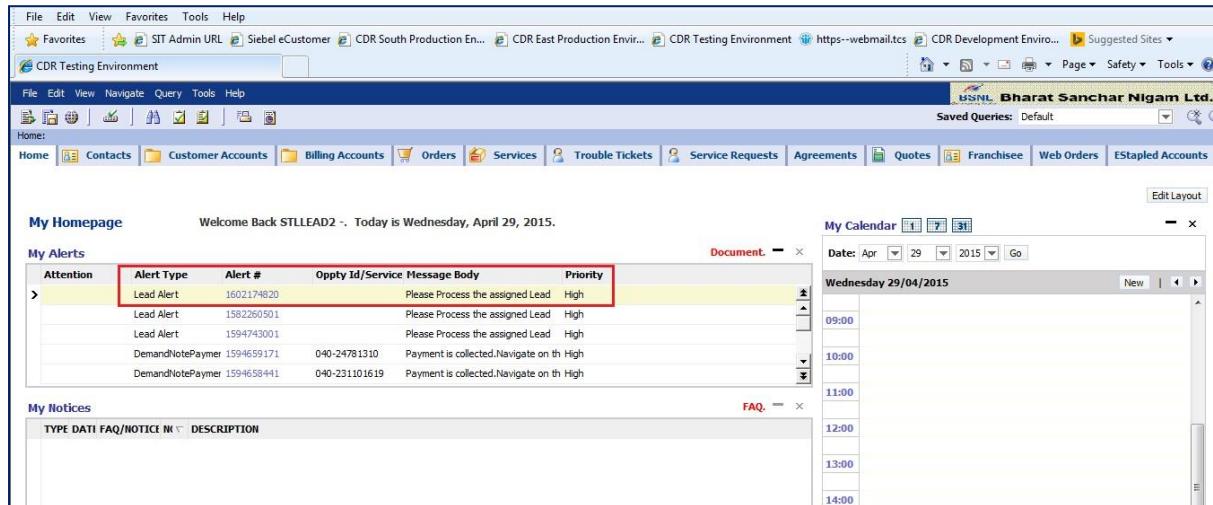


16. On clicking on Alert#, it will redirect him to Lead Management Screen → My Leads View.

Screenshot of Lead Management Screen.
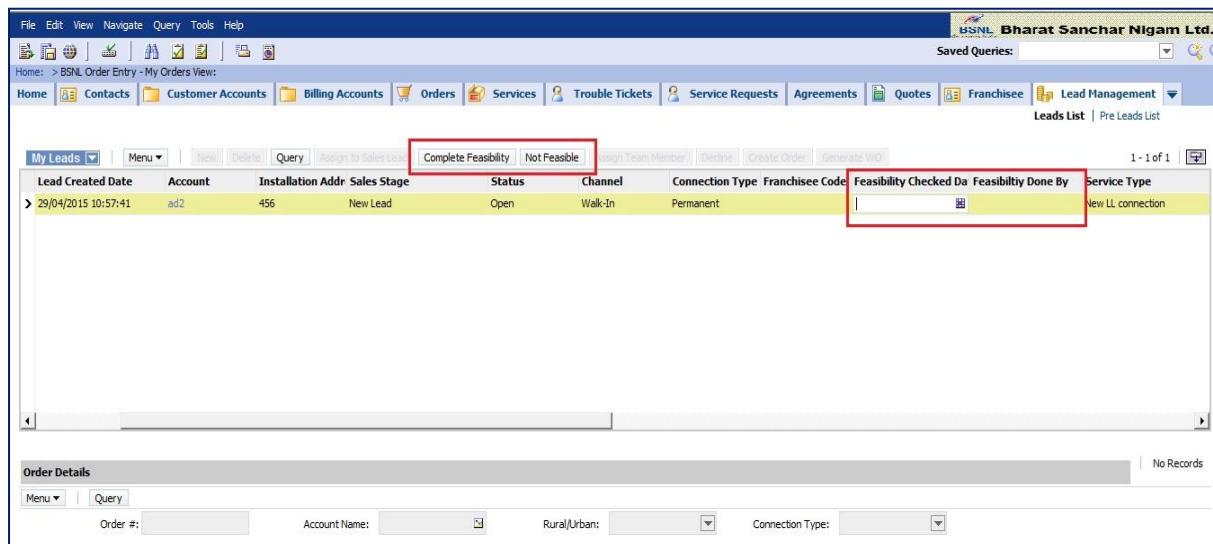


17. STL gets feasibility check done by JTO outside CRM system. With the received information, STL enters the "Feasibility Checked Date" and "Feasibility Done By" fields and clicks on **Complete Feasibility** button.
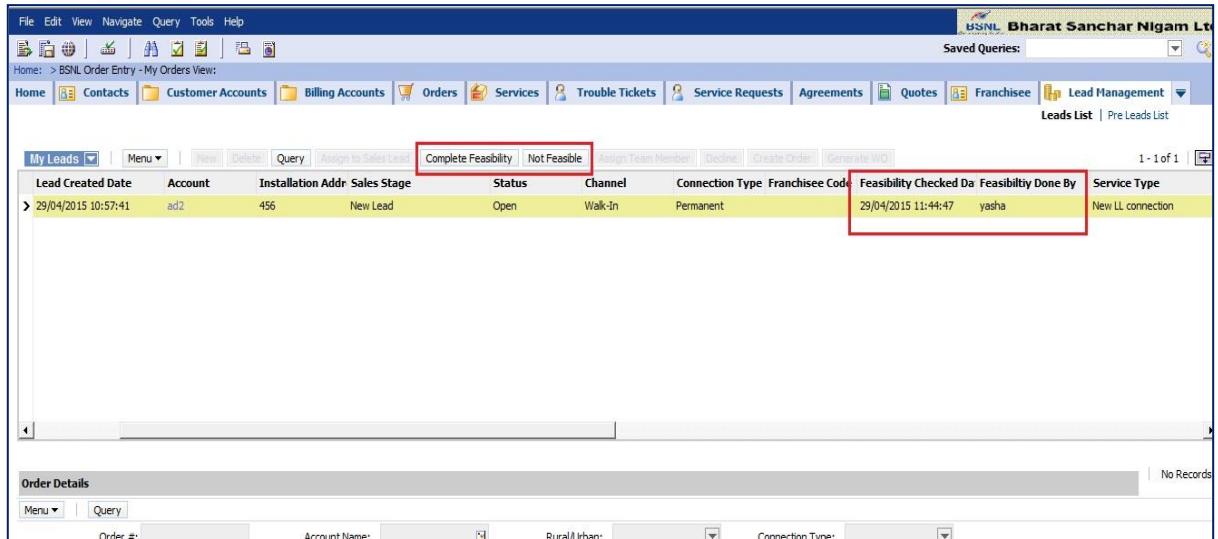
18. If the connection is not feasible, STL clicks on Not Feasible button, and thus the Sales Stage changes to Not Feasible and status changes to Closed.
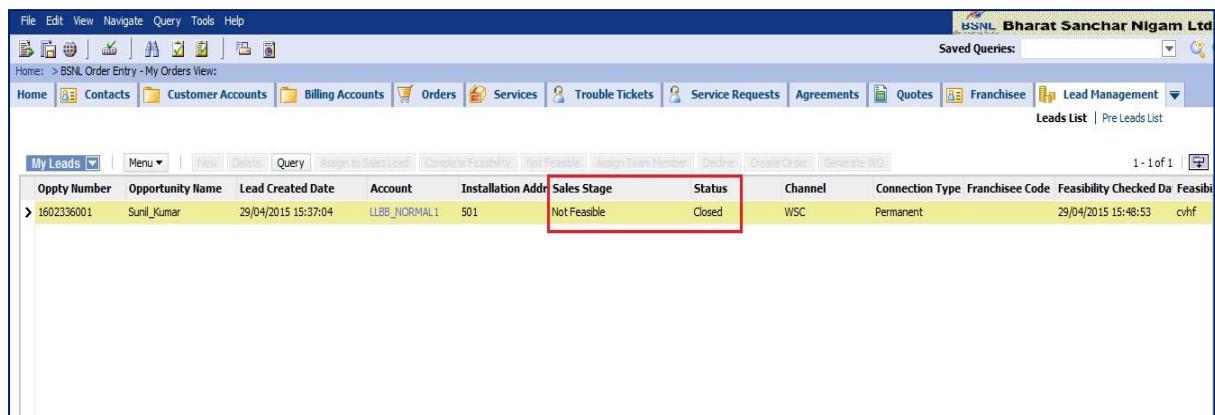


19. After positive feasibility, STL assigns the lead to Sales team member under him by picking a value from the field "Sales HRMS Name". "Sales HRMS Number" and "Sales HRMS Mobile Number" fields will be autopopulated as per STM information stored in CRM. STL then clicks on **"Assign Team Member"** button

20. After it gets assigned to Team Member, he manually collects CAF and payment from Customer. STL can now proceed with Order Creation by clicking on **Create Order** button.



21. If Customer is not interested and conveys the same to STM, STL can click on **Decline** button, lead Status changes to Closed.
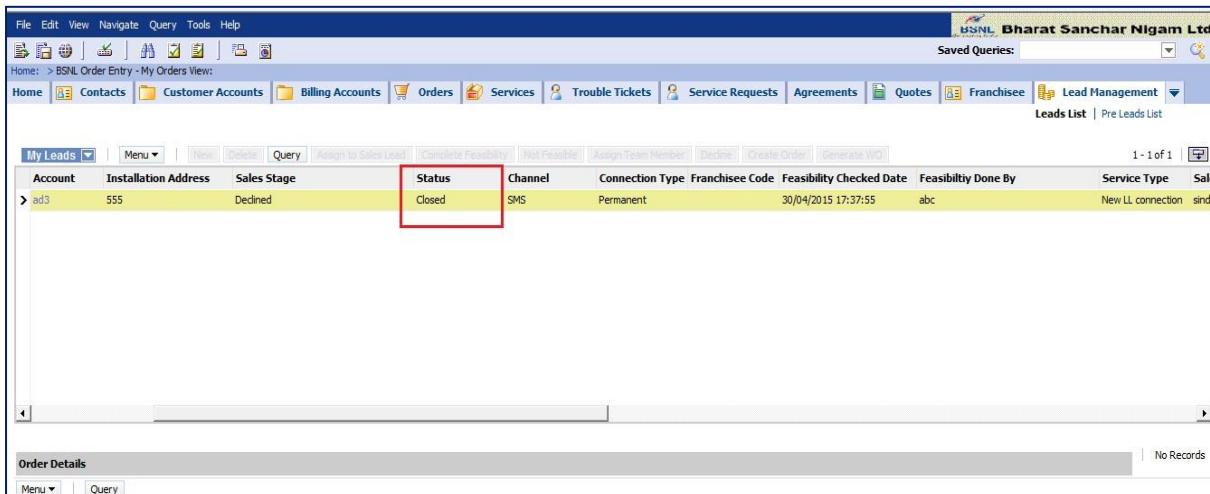
22. If we click on **Generate WO** button, a jsp page is invoked, which gives customer, lead and other additional details. This way the Sales Lead gets to know the customer's detail and may contact him for any information.
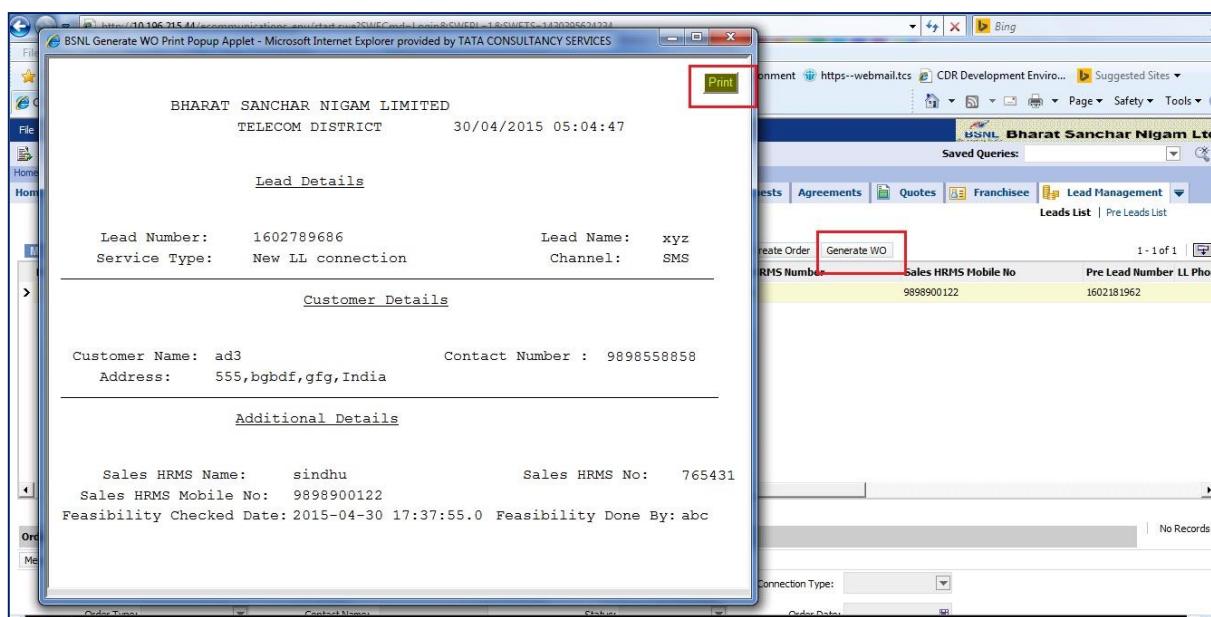


23. If we click on **Create Order** button, it redirects us to Order Page.

24. At this point order is created only if at least one Billing account exists under Customer account. If not, an error message will be thrown and STL has to create a new billing account for the customer under Billing Account View.

25. To differentiate UDAAN Order with other orders, in More Info tab, value of UDAAN Flag is "Y".



26. After adding Line Items, choosing required plans, facilities, accessories, etc, we click on **Available Numbers** button.

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27. After choosing the required number from the pop up window of Available numbers, Order Sub status changes to *Number Available.* Then click on **Reserve Number** button.



28. Now the order sub status changes to *Port Available*. Now click on **Accessory Check** button.

29. After clicking on Accessory Check button, order sub status changes to *Accessories Check Done*. Now click on **Validate button**.

30. After successful validations, order substatus changes to Validation Successful. Now click on **Demand Note** button.

31. After making demand note from PMS, click on Submit button.



32. Once the order is submitted, substatus changes to Submission In Progress and after hitting to Clarity, it changes to In Progress.

33. After order is completed in Clarity, check in Lead Management Screen. Sales Stage of the Lead is Order Closed.

## 2.2.          Lead Creation for existing customer

1. This section tells user how to create a lead for existing BSNL Customer.

2. Since the customer is existing, customer account, contact details, address, billing account will already be existing for the customer.

3. We can directly go to Leads View and create a new lead by clicking on New button. Add the mandatory details, choose the Channel and assign to Sales Lead.

4. Login through the assigned Sales Lead, click on the alert that redirects to Lead Management Screen.

5. Check for feasibility, fill mandatory columns like Feasibilty Checked Date, Feasibility Done by and click on Complete Feasibility.

6. By entering Sales HRMS Name, Number and Mobile Number, click on Assign Team Member.

7. Once it is assigned to Team Member, we can click on Create Order to proceed with the creation of Order.

8. Then the normal order flow follows.

## 2.3.          Lead Creation When Channel is Internet (through WSC main page, without login)

1. Go to eCustomer application giving the URL, and click on Book a New Service/Broadband Connection.
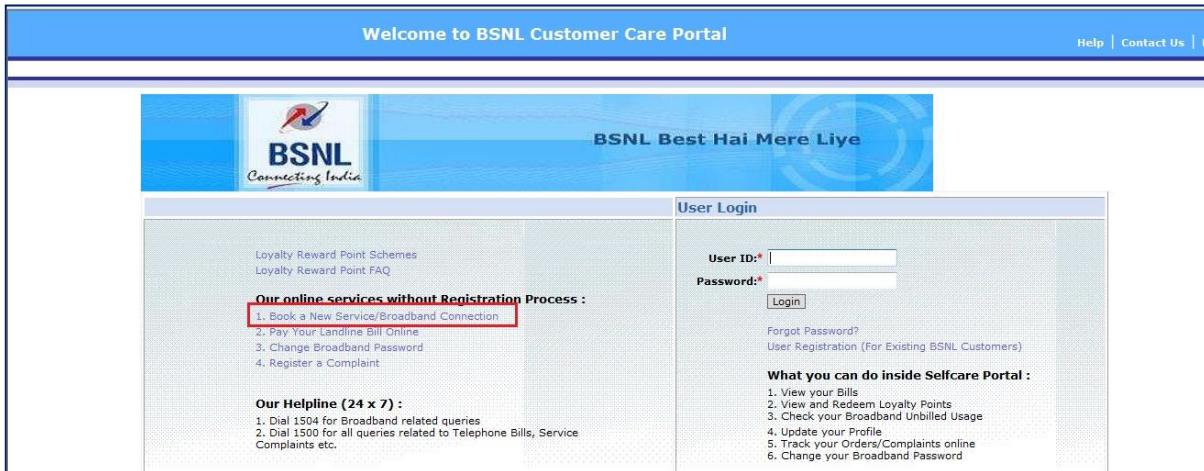
2.  The above link redirects to registration page. Fill in the mandatory details and click on Submit.



3.  In Siebel Application, login through WSCCSR login. On his home page, an automated alert will be generated which leads to Lead Management Screen, Pre Lead List View.
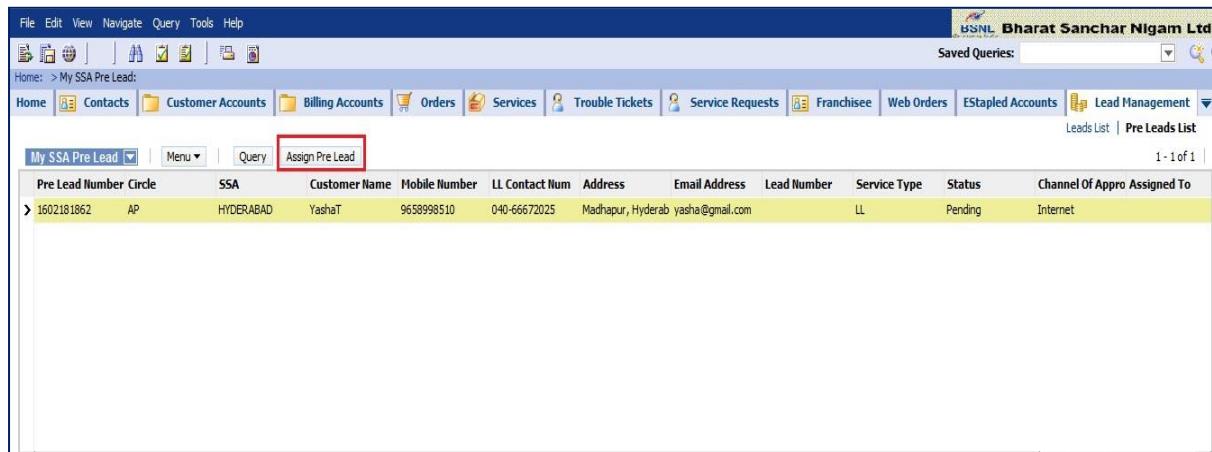
4. In My SSA Pre Lead Applet, click on **Assign Pre Lead .** It will be assigned to himself and then the record can be seen in My Pre Lead Applet. Channel of Approach is Internet and Status changes to Pending.
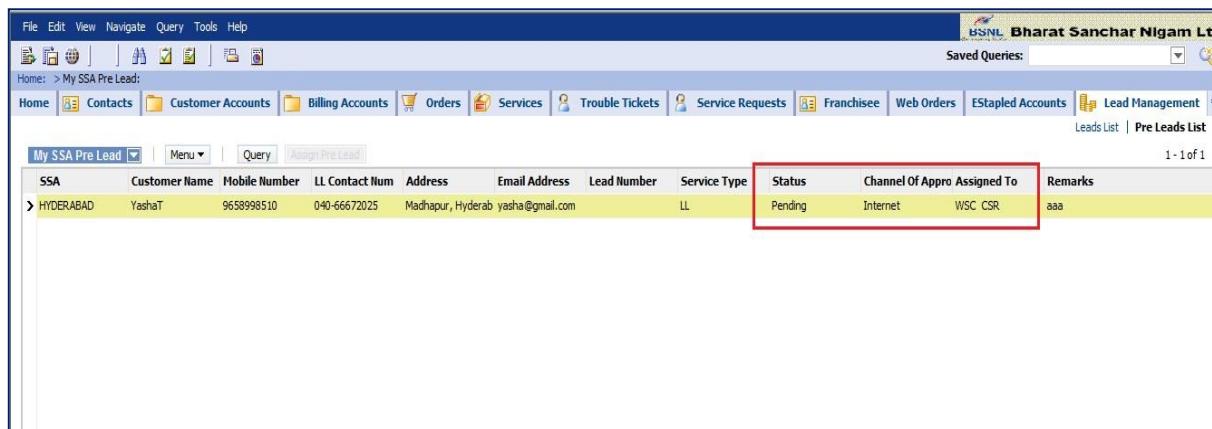


5. In My Pre Lead Applet, the pre lead can opt for an option of Call Later. Thus the status changes to Call Later.
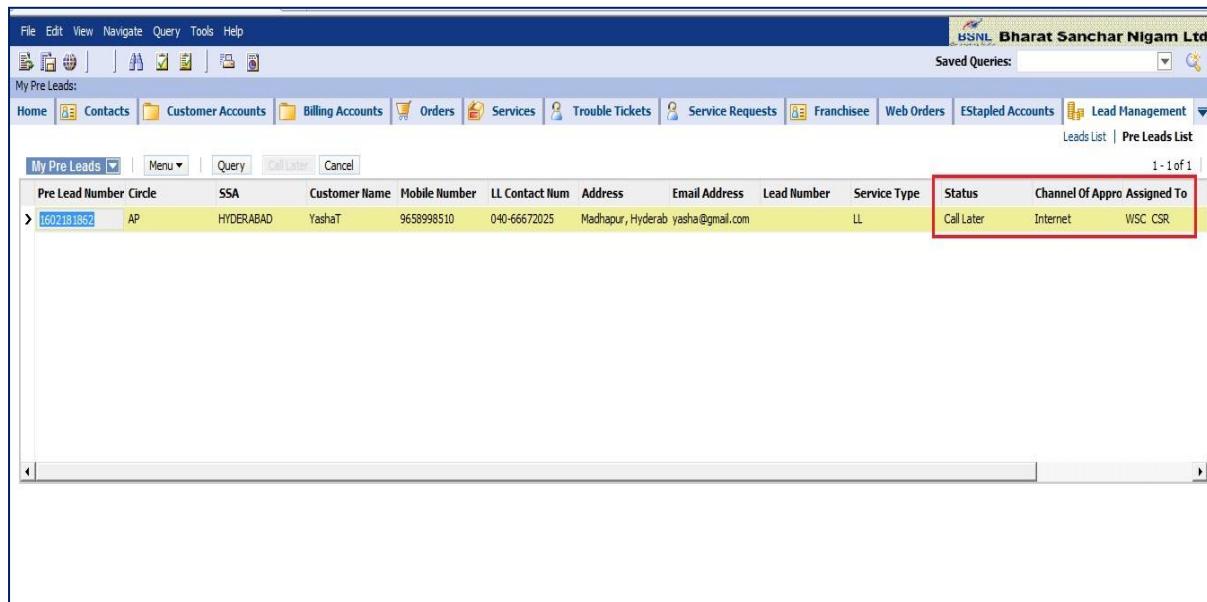
6. The Sales Lead will call the customer and ask whether he is a new customer or existing.In Case of new customer, he will create a new Customer Account, add Address, Billing Account and Go To Leads Applet. In Case of existing customer, he can directly go to Leads Applet and create a new Lead. Channel is WSC (Internet), so pick Pre Lead which was created now.
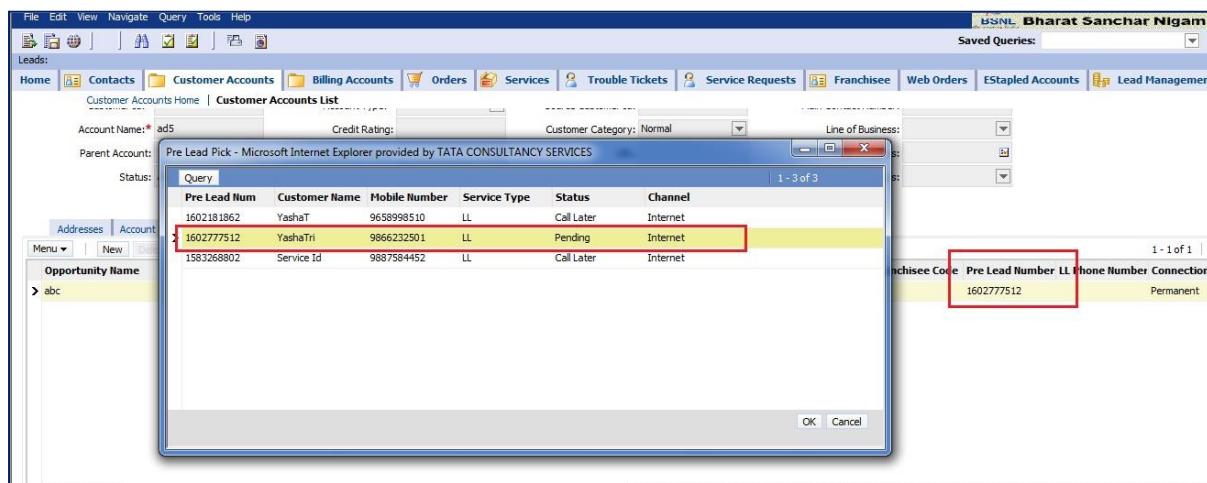


7. After picking Pre Lead associated to that lead, click on Assign to Sales Lead like other cases.

8. Now the Pre Lead status in Pre Lead Applet changes to Converted to Lead.

9. Once the opportunity is assigned to Sales Lead, then same steps are followed like in above case.

10. After the Order is created and it normally flows as other orders.

### 2.4.    Lead Creation When Channel is SMS

When the end user sends an SMS requesting for the service, an alert goes to SMSCSR of the Circle same like alerts for others. This alert redirects him to Pre Lead Applet.



1. Under All Circle Pre Lead, the record will be displayed. Channel of Approach will be SMS.

2. Click on Assign Pre Lead. The record will be assigned to himself and can be seen under My Pre Lead Applet.

3. Now, if the customer is existing or new, we need to proceed accordingly like in the above cases.

4.  Go to Leads Applet under Customer Account. Fill in the mandatory details after clicking on **New** button.

5.  Here Pre Lead Number is a mandatory field. Only those pre leads will appear in the applet which are having status as Pending or Call Later.

6.  Here Channel will come as SMS.

7.  Click on Assign to Sales Lead and thus the record gets assigned to Sales Lead according to the respective circle.

8.  After this, login through the Assigned Sales Leads Credentials and click on Alerts on his home page, which redirects him to Lead Management Screen.

9.  Then the same steps follows like in other cases.



## 2.5.        **Lead Creation After Login Through WSC**

1.  Login through ecustomer login credentials, Under Service, New Service Connection leads to My Lead Details page.

2.  Fill in the mandatory details. Click **Submit**.

3.  A new record with status as Open is created in My Lead Details page.

4. Now based on the address SSA chosen, it will be directly assigned to Sales Lead.

5. Login through the Sales Lead credentials, In his home page, alert will be generated which redirects him to Lead Management Screen > Leads List View.

6. In this case the channel of approach will be WSC.

7. Check feasibility, fill mandatory fields and proceed with the Creation of Order.